

EMPLOYEE'S USER'S GUIDE

Colgate University

Performance Evaluations



PeopleAdmin, Inc.
816 Congress Avenue
Suite 1800
Austin, TX 78701
877-637-5800

TABLE OF CONTENTS.....

INTRODUCTION	3
GETTING STARTED	4
FILLING OUT YOUR SELF REVIEW	5
Evaluation Details	8
Self Review	9
Attach Documents	10
History.....	11
Submitting Evaluation to your Supervisor	12
Viewing Historical Evaluations	17

INTRODUCTION

.....

Welcome to the Colgate University Position Evaluation System. This system helps automate many of the paper-driven aspects of the evaluation process.

You will use this system to:

- Fill out your Self Review
- View past evaluations
- Initiate Requests for Reassessment (Support Staff Positions only)

The system is designed to benefit you by facilitating:

- Faster processing of evaluations and approvals
- Up-to-date access to information regarding all of your present and past employee reviews

These training materials are provided to assist with your understanding and use of this system.

Your Web Browser

The Position Management System is designed to run in a web browser over the Internet. The system supports browser versions of Netscape 4.7 and above and Internet Explorer 4.0 and above. However some of the older browser versions are less powerful than newer versions, so the appearance of certain screens and printed documents may be slightly askew. Please notify the system administrator of any significant issues that arise.

The site also requires you to have Adobe Acrobat Reader installed. This is a free download available at www.Adobe.com.

It is recommended that you do not use your browser's "Back", "Forward" or "Refresh" buttons to navigate the site, or open a new browser window from your existing window. This may cause unexpected results, including loss of data or being logged out of the system. Please use the navigational buttons within the site.

The site is best viewed in Internet Explorer 5.5 and above.

Security of Data

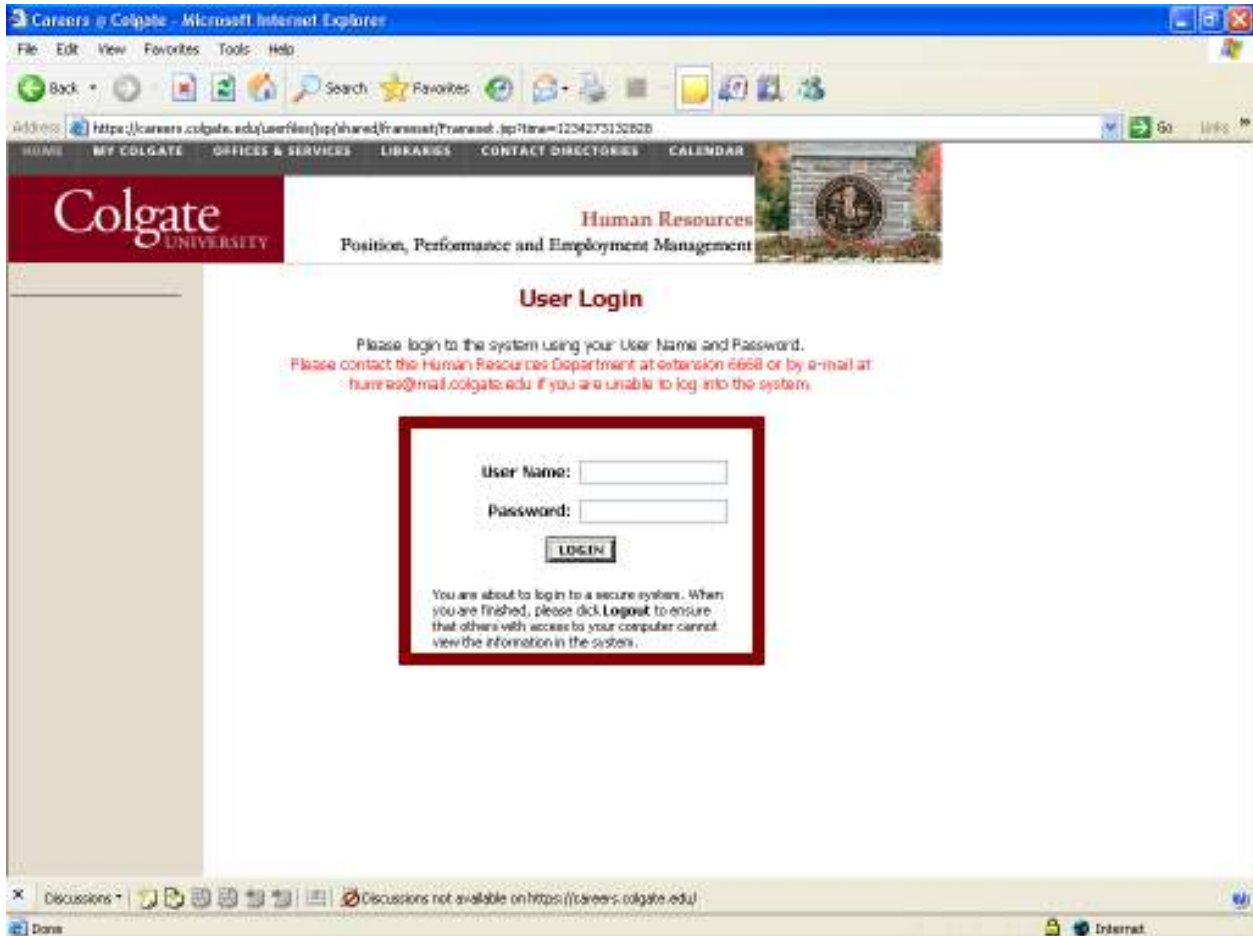
To ensure the security of the data provided by users, the system will automatically log you out after 60 minutes if it detects no activity. However, anytime you leave your computer we strongly recommend that you save any work in progress and logout of the system by clicking on the Logout link located on the bottom left side of your screen.

It is recommended that you copy and paste your comments from a Word document. Grammar and spell check features are not included in the site.

GETTING STARTED

.....

First, you will need to go to the Position Management Site. After entering the URL (<https://careers.colgate.edu/hr>), the “login screen” for the system will appear and should be similar to the following screen:

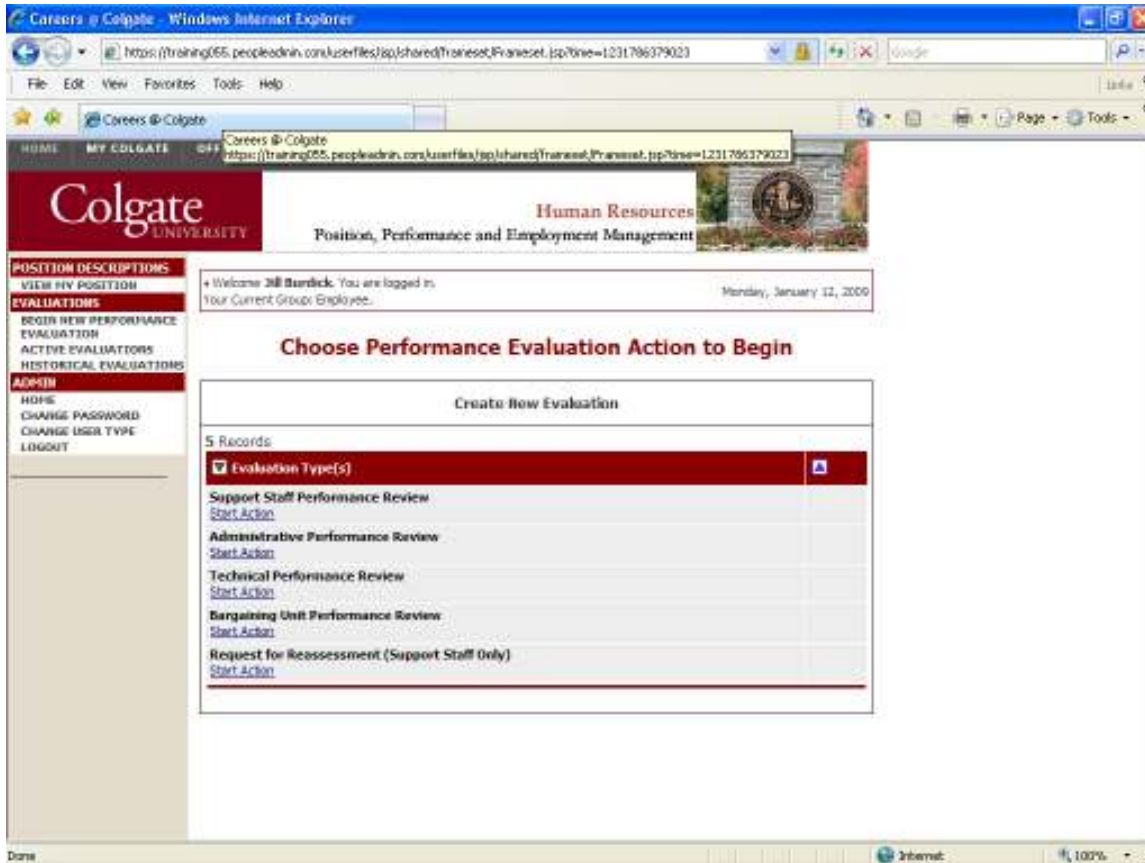


Log in using your user name and password.

FILLING OUT YOUR SELF REVIEW

.....

Once logged in you will click the **Begin New Performance Evaluation** link on the left hand navigation bar.



Click on the **Start Action** link under the appropriate evaluation type to begin your self-review.

Click on the **SEARCH** button.

The screenshot shows a web browser window titled "Careers @ Colgate - Windows Internet Explorer". The address bar shows a URL starting with "https://training055.peopleadmin.com...". The browser's menu bar includes "File", "Edit", "View", "Favorites", "Tools", and "Help". The browser's toolbar shows "Careers @ Colgate" as the current page. The website header includes navigation links: "HOME", "MY COLGATE", "OFFICES & SERVICES", "LIBRARIES", "CONTACT DIRECTORIES", and "CALENDAR". The Colgate University logo is on the left, and "Human Resources" and "Position, Performance and Employment Management" are on the right. A navigation menu on the left lists "POSITION DESCRIPTIONS", "EVALUATIONS", and "ADMIN" with sub-links. A welcome message says "Welcome Jill Burdick. You are logged in. Your Current Group: Employee.. Monday, January 12, 2009". The main heading is "Support Staff Performance Review". Below it is a search form titled "Search Positions to Begin Action On" with fields for "Position Title", "Position Number", "Employee First Name", "Job Category", "Employee ID Number", and "Employee Last Name". There are buttons for "SEARCH", "CLEAR RESULTS", and "CANCEL EVALUATION". The browser status bar at the bottom shows "Done", "Internet", and "100%".

Click on the **Start Action** link, once you have confirmed your position information is listed correctly.

The screenshot shows a web browser window displaying the Colgate University Human Resources portal. The page title is "Support Staff Performance Review". The main content area is titled "Choose Position to Begin Action On" and displays a table with one record:

Position Title	Position Number	Employee Id	Employee Last Name	Last Action
Human Resources Assistant	AS2001	000201229	Burdick	Access to Position Description Changed View History

Below the table is a search section titled "Search Positions to Begin Action On" with the following fields:

- Position Title:
- Position Number:
- Employee First Name:
- Job Category:
- Employee ID Number:
- Employee Last Name:

Buttons for "SEARCH", "CLEAR RESULTS", and "CANCEL EVALUATION" are visible at the bottom of the search section.

Evaluation Details

Evaluation Details will be the first tab displayed. These fields are not editable, but show you some useful information.

Evaluation Details	<u>Self Review</u>	<u>Attach Documents</u>	<u>History</u>
CONTINUE TO NEXT PAGE >>			
<p>*Required information is denoted with an asterisk.</p>			
Employee First Name:	Sample		
Employee Last Name:	Employee		
Due Date:	01/31/2008		
Note: On the specified date, this evaluation will automatically forward from the employee to the supervisor.			
Position Title:	Administrative Assistant - Sample		
Evaluation Cycle Begin Date:	01/01/2007		
Evaluation Cycle End Date:	12/31/2007		
Division/Department:	AS-Administrative Services		
Other Users in Department Who Need Access to this Evaluation:	Employee, Sample Supervisor/Dept Chair, Sample		
<p>*Required information is denoted with an asterisk.</p>			
CONTINUE TO NEXT PAGE >>			

Once you have reviewed the information on this tab you can click the **Continue to Next Page** button to move to the **Self Review** tab.

Self Review

On this screen you will fill out your **Self Review**. Here you will list your accomplishments, discuss your performance as well as your plans for development. You also have the option of listing any other comments you may have. It is recommended that you copy and paste your comments from a Word document. Grammar and spell check features are not included in the site.

Evaluation Details	Self Review	Attach Documents	History
<< RETURN TO PREVIOUS		CONTINUE TO NEXT PAGE >>	
<p>*Required information is denoted with an asterisk.</p>			
ACCOMPLISHMENTS: Discuss your specific accomplishments during the last year.			
PERFORMANCE: Discuss your performance over the past year. What do you see as your strengths? In what areas could you improve?			
DEVELOPMENT/PERFORMANCE ACTION PLANS: Discuss your specific plans for skill and/or competency development or performance improvement. What do you need from your supervisor to perform your job more effectively?			

When finished click on **Continue to Next Page**.

Attach Documents

Here you can attach any documents that might be pertinent to your evaluation. There are instructions listed on the screen describing which document types you can attach as well as other formatting requirements. You will see both Employee and Supervisor documents listed below, but you should only be attaching documents to the ones labeled Employee.

Attach / Remove	Document Type	Attached Document
Attach	Employee Doc 1	Not Attached
Attach	Employee Doc 2	Not Attached
Attach	Employee Doc 3	Not Attached
Attach	Supervisor Doc 1	Not Attached
Attach	Supervisor Doc 2	Not Attached
Attach	Supervisor Doc 3	Not Attached

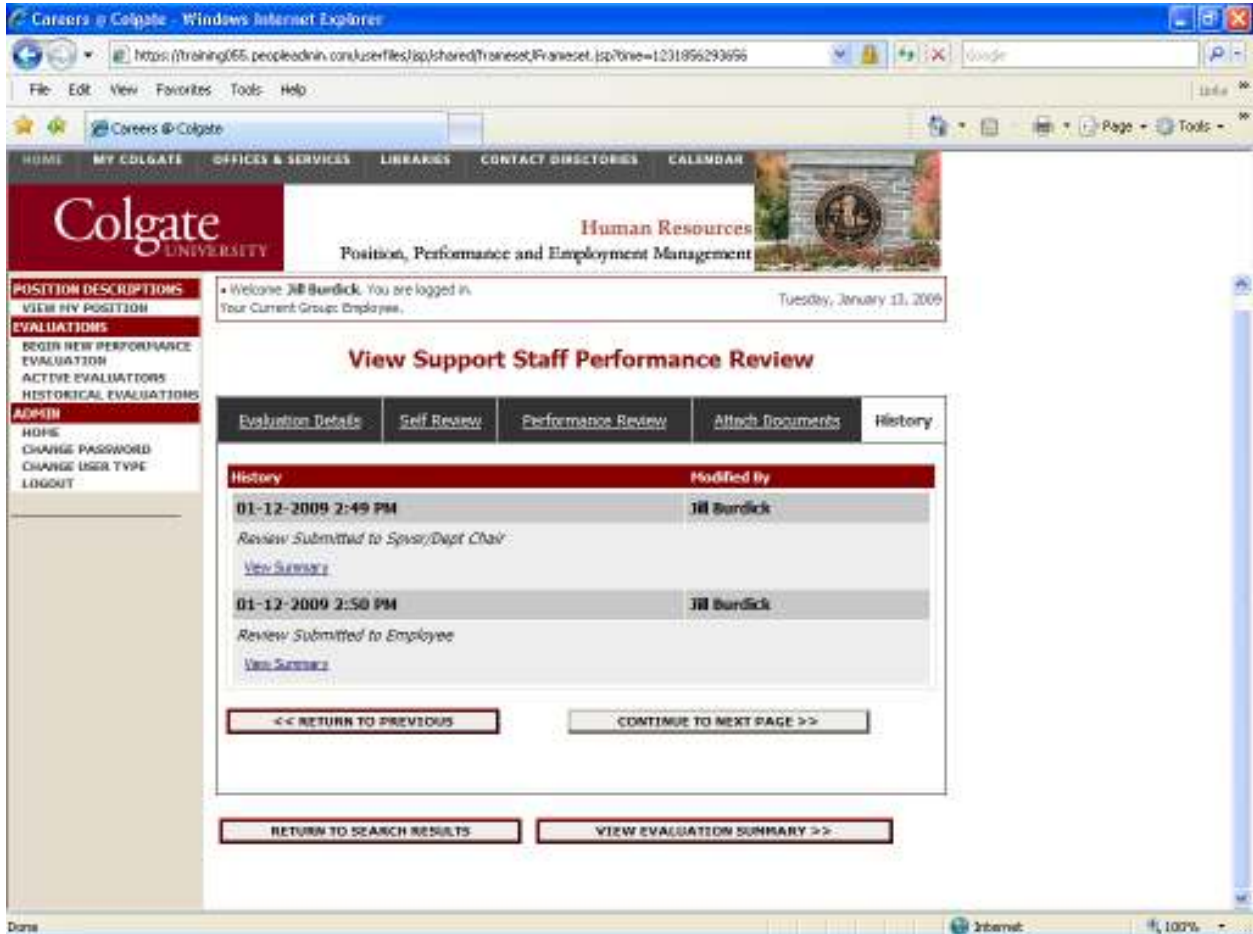
<< RETURN TO PREVIOUS **CONTINUE TO NEXT PAGE >>**

CANCEL **VIEW EVALUATION SUMMARY >>**

Once finished, click on **Continue to Next Page**.

History

On the next tab you will see the history of this particular evaluation. As the evaluation moves forward through the approval process you can track its progress by viewing this tab.



The screenshot shows a web browser window displaying the Colgate University Human Resources system. The page title is "View Support Staff Performance Review". The user is logged in as Jill Burdick. The page has a navigation menu with tabs: "Evaluation Details", "Self Review", "Performance Review", "Attach Documents", and "History". The "History" tab is selected, showing a table of evaluation history.

History	Modified By
01-12-2009 2:49 PM Review Submitted to Spvs/Dept Chair View Summary	Jill Burdick
01-12-2009 2:50 PM Review Submitted to Employee View Summary	Jill Burdick

Navigation buttons at the bottom of the page include: "<< RETURN TO PREVIOUS", "CONTINUE TO NEXT PAGE >>", "RETURN TO SEARCH RESULTS", and "VIEW EVALUATION SUMMARY >>".

After viewing this screen, click on **Continue to Next Page**.

Submitting Evaluation to your Supervisor

On this screen you can review all the information that you have entered in the previous tabs. Should something need editing you can click the **Edit** link that appears directly above the **Evaluation Status** box. If you would like to continue working on your evaluation at a later time before sending it on to your supervisor for approval you can select the **Save** option in the **Evaluation Status** box and then click the **Continue** button. If you are finished and ready to submit your evaluation, select the **Submit Review to Supervisor/Dept Chair** button and then click the **Continue** button.

View Support Staff Performance Review Summary

To change the status of this action, choose from the statuses below:

[Edit](#)

 [Printer-Friendly Version](#)

Evaluation Status

- Save
- Submit Review to Supervisor/Dept Chair

CANCEL

CONTINUE

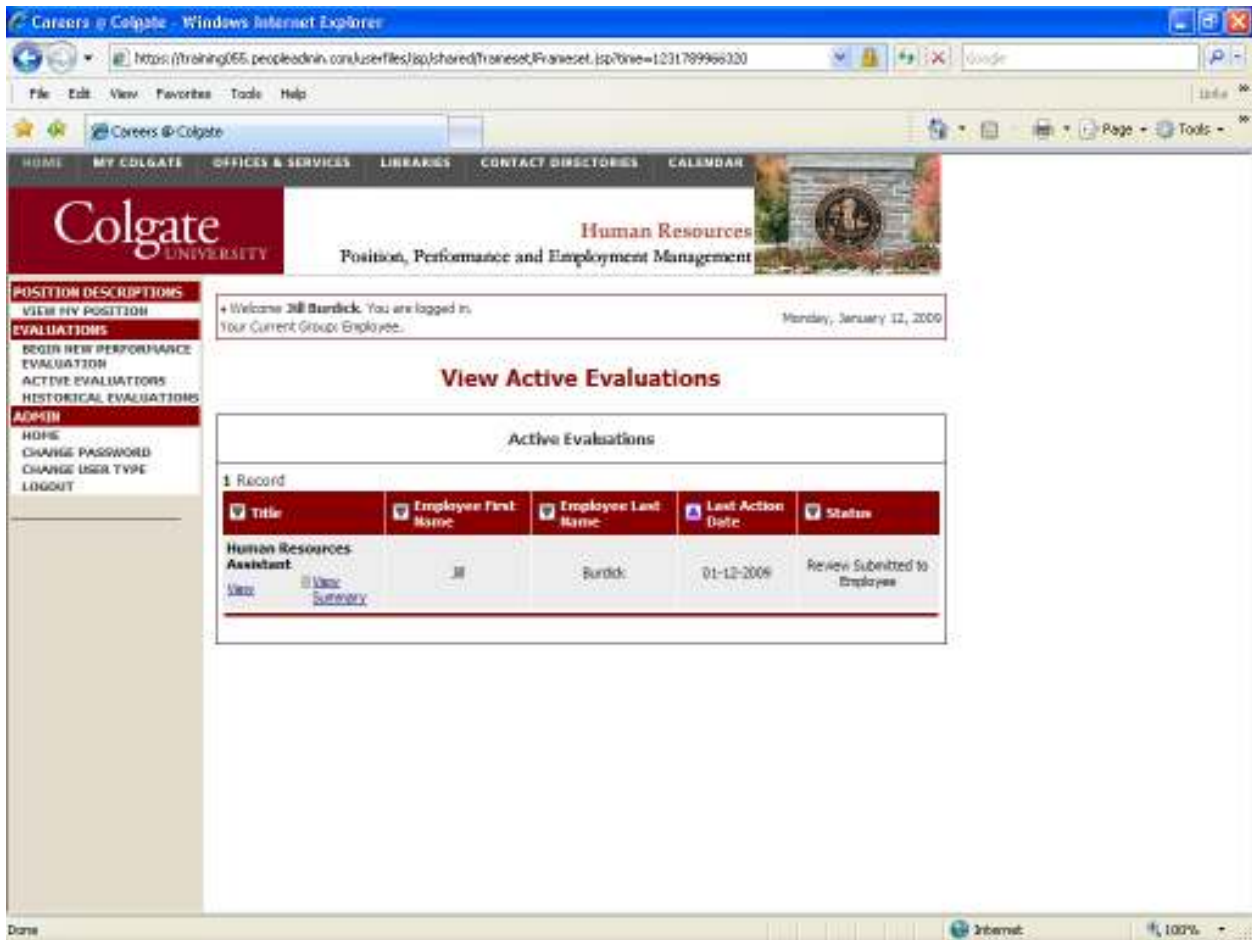
Evaluation Details

Employee First Name:	Sample
Employee Last Name:	Employee

After you have clicked the **Continue** button the system will ask you to confirm. Click the **Confirm** button and you have successfully **Saved** or **Submitted** your evaluation.

Reviewing your Evaluation from your Supervisor

Once your supervisor has filled out your performance review and submitted it on you will receive an email notifying you that the status of the evaluation has changed to **Review Submitted to Employee for Review**. Log into the system and click the link called **Active Evaluations** on the navigation bar.

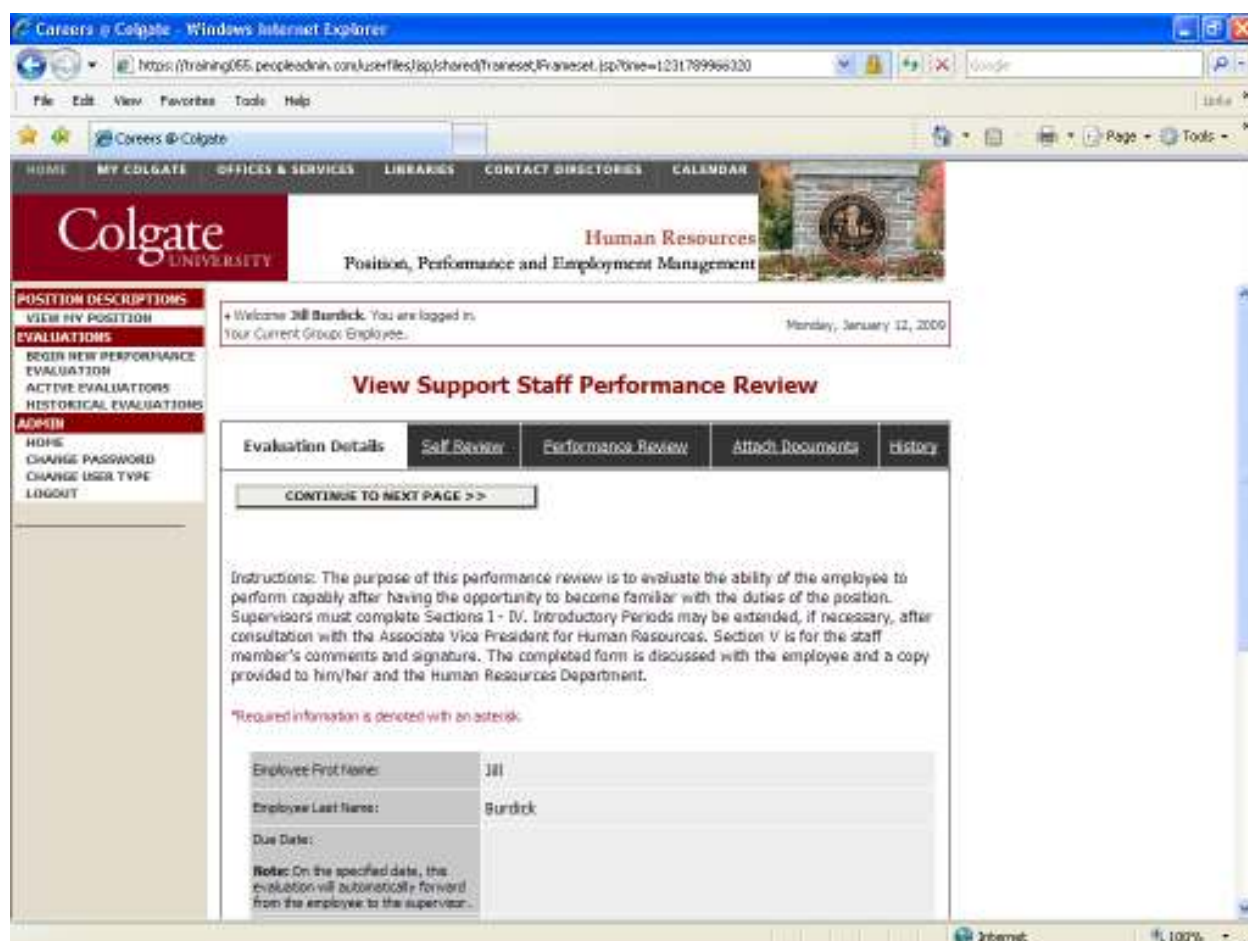


The screenshot shows a web browser window displaying the Colgate University Human Resources system. The page title is "View Active Evaluations". A navigation bar on the left includes links for "POSITION DESCRIPTIONS", "EVALUATIONS", and "ADMIN". The main content area shows a table of active evaluations with the following data:

Title	Employee First Name	Employee Last Name	Last Action Date	Status
Human Resources Assistant	Jill	Burdick	01-12-2009	Review Submitted to Employee

Below the table, there is a "View" link for the record.

Click the **View** link.



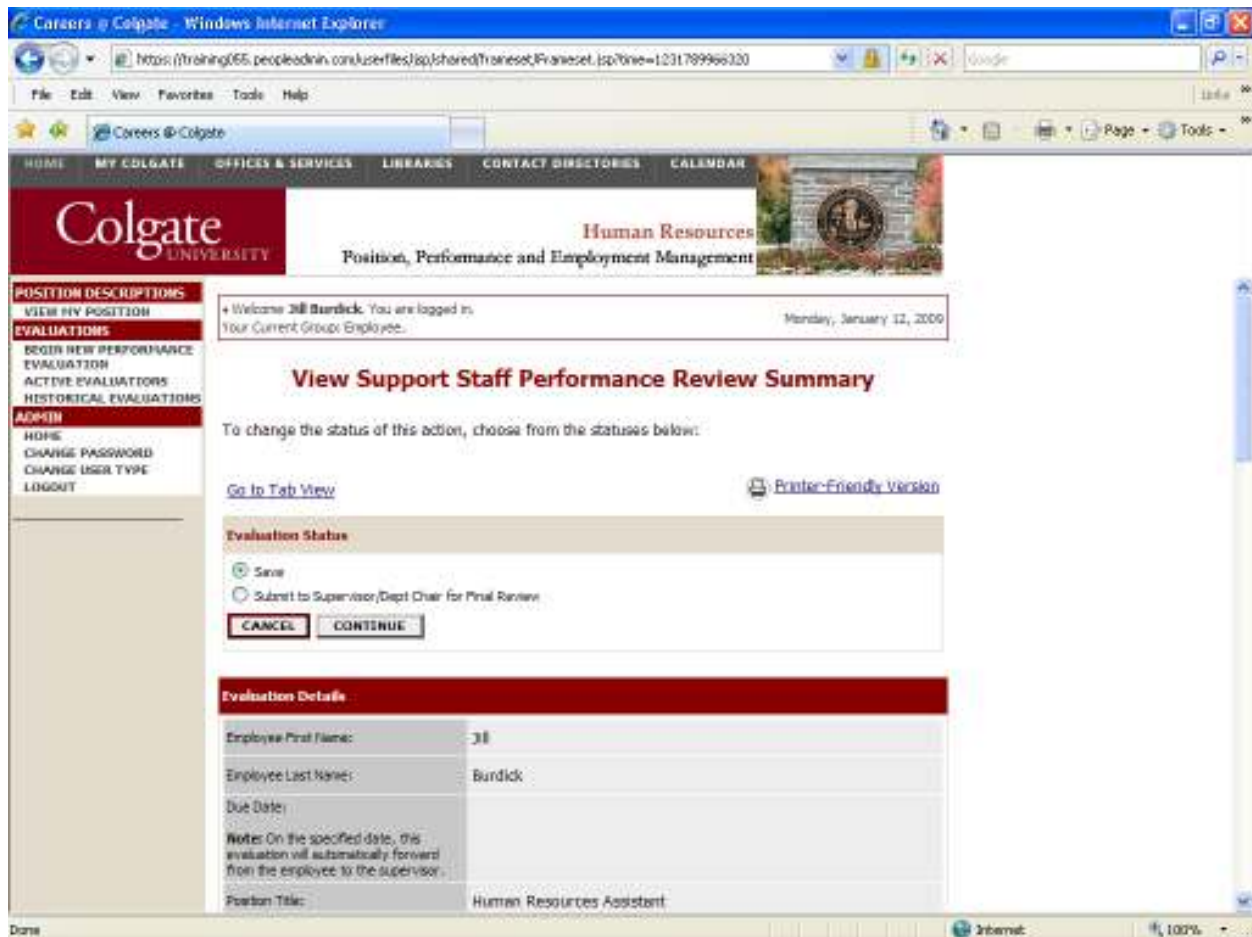
After reviewing this screen **Continue to Next Page** or click on the **Performance Review** tab.

Review the information listed under the **Performance Review** tab.

The screenshot shows a web browser window titled "Careers @ Colgate - Windows Internet Explorer". The address bar shows a URL starting with "https://training055.peopleadmin.com...". The browser's menu bar includes "File", "Edit", "View", "Favorites", "Tools", and "Help". The page header features the Colgate University logo and the text "Human Resources Position, Performance and Employment Management". A navigation bar includes links for "HOME", "MY COLGATE", "OFFICES & SERVICES", "LIBRARIES", "CONTACT DIRECTORIES", and "CALENDAR". A sidebar menu on the left lists categories like "POSITION DESCRIPTIONS", "EVALUATIONS", and "ADMIN". The main content area displays a "View Support Staff Performance Review" page with tabs for "Evaluation Details", "Self Review", "Performance Review", "Attach Documents", and "History". The "Performance Review" tab is active. Below the tabs are navigation buttons: "<< RETURN TO PREVIOUS" and "CONTINUE TO NEXT PAGE >>". A note states: "*Required information is denoted with an asterisk." The main content area contains several sections with text and input fields:

- PERFORMANCE:** Discuss staff member's performance relative to job expectations, including quality, timeliness, volume, etc.
- PERFORMANCE:** Additional space (if required)
- OVERALL PERFORMANCE:** Evaluate the person's overall performance of the responsibilities of the position; describe particular strengths and identify areas where improvement or further development could be beneficial.
- OVERALL PERFORMANCE:** Additional space (if required)
- DEVELOPMENT PERFORMANCE:**
- ACTION PLANS:** Discuss specific plans

After reviewing this screen click on the **View Evaluation Summary** link.



If you are finished reviewing your evaluation, select the **Submit Review to Supervisor/Dept Chair for Final Review** button and then click the **Continue** button.

Viewing Historical Evaluations

You can also view your past evaluations if they were entered in this system. Click on the Historical Evaluations link on the left hand navigation bar.

View Historical Evaluations

Historical Evaluations				
1 Record				
<input checked="" type="checkbox"/> Title	<input checked="" type="checkbox"/> Employee First Name	<input checked="" type="checkbox"/> Employee Last Name	<input type="checkbox"/> Last Action Date	<input checked="" type="checkbox"/> Status
Administrative Assistant - Sample View View Summary	Sample	Employee	01-09-2008	Support Staff Performance Review Complete

This will show you all the past self reviews and evaluations that were completed for you within this system.